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Leap into the Future

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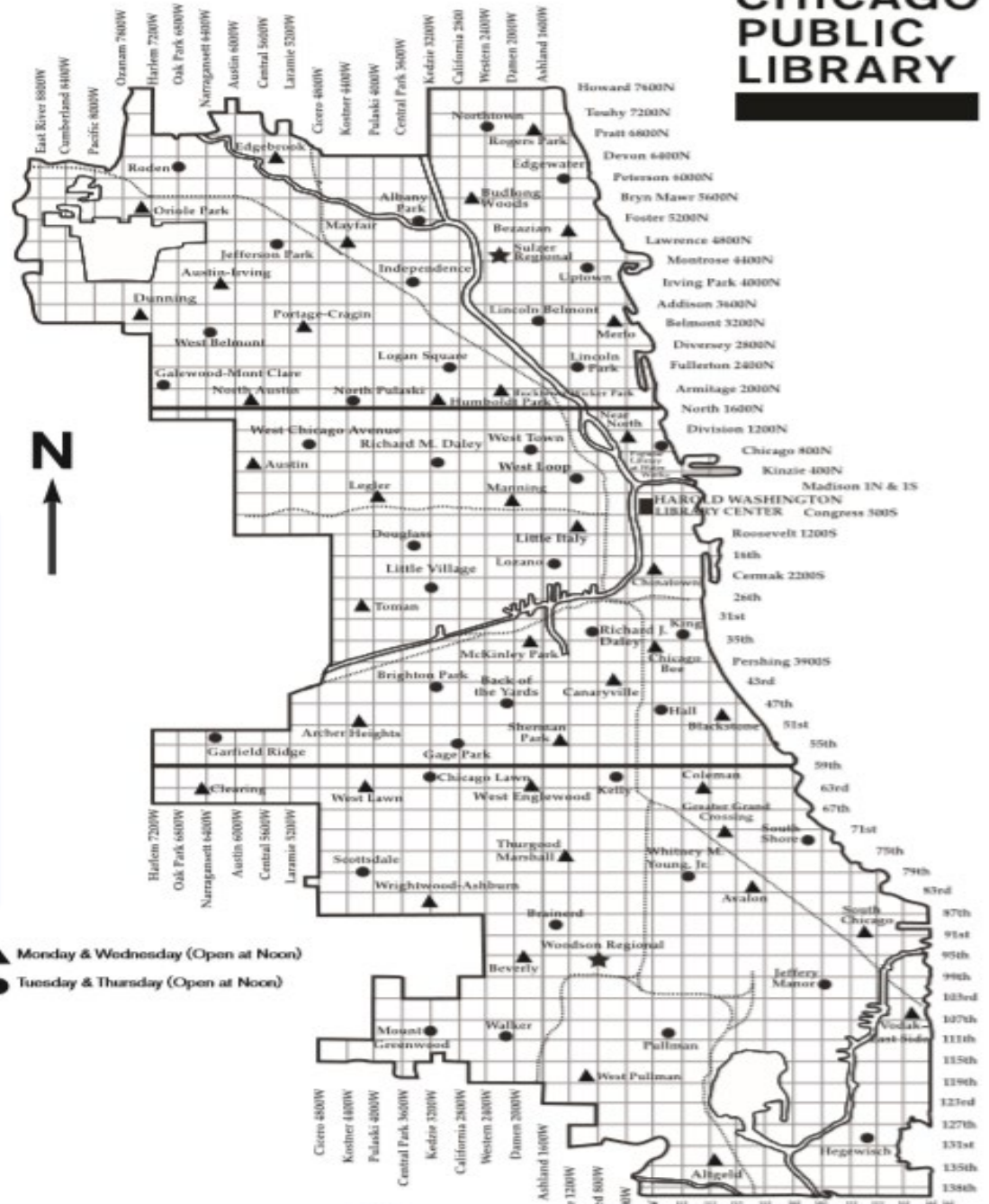


CPL Highlights Facts and Figures

Locations	81
Employees	950
Staff PCs	1,500

Circulation	10,500,000
Holdings	6,700,000
Patrons	1,700,000

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Time was running out,
our existing ILS contract was
ending and our infrastructure was
end of life





- Cloud-based environment (Leap)
- Fully hosted solution
- Robust training solutions
- Reporting for staff at all levels
- Solution for large, complex library system



It was time to take the Leap.....



- Aggressive timeline
- Change management principle
- Staffing
- Training (proficiency levels)



Implementation Team

- Project Manager
- Chief of Technology, Content & Innovation
- Assistant Chief of Technology, Content & Innovation
- Circulation Coordinator
- Technology Librarian
- Contracts Coordinator

CPL Subject Matter Experts as Needed

- Cataloging
- Acquisitions
- Serials
- Finance
- City's IT team



- Create profiles
- Data extracts (mapping)
- Workflow analysis
- Testing (data, functionality, third-party integration)
- Policy & procedure changes (Board approval)
- Training
- Migration
- Implementation

Training Team

- III trainers
- CPL subject matter experts
- CPL staff volunteers



Training

- 2 sessions running simultaneous
- Offered 90 classes; more than 900 people attended

Training Strategy

- Hands-on training (classroom and on the road at branches)
- Webinars (serials, check in shelf-ready materials, offline)
- Training sandbox
- Cluster meeting trainings
- Readiness homework certificates
- All Staff Institute Day

Training team continued to support staff after go-live via phonebank, emails and on-site support.

SME training also provided (Cataloging, Serials, Acquisitions, etc.)



Leading Up to Transition

- Collections changes
- Circulation due dates extended
- Notices delayed
- Offline circ

During the transition, patrons were able to:

- Check out
- Check in
- New registration
- Access to public computing
- Public printing
- OverDrive
- Hoopla
- RBdigital magazines and audiobooks
- Online resources



During the transition, patrons weren't able to:

- Log into CPL website
- Place or manage holds
- Pay fines
- Find up-to-date information about availability of material on the website



The key to making this all work was **COMMUNICATION**

Patrons

- Signage
- Website updates along the way



Staff

- Cluster meeting updates
- Daily, weekly and monthly email updates
- Quarterly newsletter
- Training, training and more training

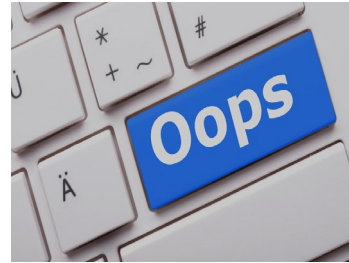
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April 2017

CPL Goes Live with Polaris



- Printing
- Notices (Overdue & Lost)
- Accessibility



CPL uses Polaris Leap exclusively for all circulation transactions.





CPL Leap Favorites list:

- Circ on Web Browser
- Patron Merge
- Notices History
- Associations
- Charge Properties
- History
 - Transaction
 - Hold
 - Item Record

What are your favorite things in Leap?





Polaris has enabled CPL to:

- Go paperless with cash reports
- Customize staff interface
- Provide real-time outreach services
- Reciprocal Library Verification Tool
- Data analytics

Paperless Cash Reports



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SQL Server Reporting Services

★ Favorites Browse

Home > Daily Receipts

Branch [Select a Value]

- Acquisitions (ACQ)
- Albany Park (ALBAP)
- Argyle (ARGLE)
- Archer Heights (ARCH)
- Austin (AUST)
- Austin-Young (AUYO)
- Avalon (AVALO)
- Back of the Yards (BACK)
- Beverly (BEVER)
- Benjamin (BENAM)
- Blackstone (BLACK)
- Brainerd (BRAIN)
- Brighton Park (BPAIR)
- Bucktown-Wicker Park (BUCK)
- Budlong Woods (BUOLO)
- Canaryville (CANAR)
- Chicago Ice (CHI)
- Chicago Lawn (CHOLA)
- Chinatown (CHINA)
- (COLE)
- (COLEA)
- Park (-) Bridgeport (DAIL)
- Park (-) Humboldt (HUM)
- (Closed) (DOUG)
- (DUNE)
- (E-CO) (E-CO)
- (E-CO) (E-CO)
- (E-CO) (E-CO)
- (E-CO) (E-CO)
- (E-CO) (E-CO)
- (E-CO) (E-CO)

Date []

SQL Server Reporting Services

★ Favorites Browse

Home

Home

FOLDERS (4)

- Collection Maintenance
- Reports for Branches and Regionals
- ILL

PAGINATED REPORTS (5)

- Daily Receipts
- Daily Receipts (Multi-Day)

Customize Staff Interface

New Patron Registration 2 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: Registered at: TCI (TCI)

Last name: Patron code: Adult

First name:

Middle name:

Title: Suffix:

Expiration: Term: 3 years Date: 4/16/2022

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country
------	------------	------------	------	-------	-------------	--------	---------

Address Check

Term: 99 years Date: 4/16/2118

Add... Edit... Remove Mailing Label

Notices address: (None)

Notification option: Email Address

Additional TXT notice

eReceipt option: (None)

Email address:

Phone 1: TXT

Phone 2:

Phone 3:

FAX number:

Alt Email address:

Registration

For Help, press F1

NUM

Leap Elements CPL Hides Using CSS

1. Secure record button
2. Gender selection
3. Address check date and term in Patron Registration and renew registration dialog
4. Reading history tab in Patron Account
5. Hold menu item on item records
6. Barcode field in new hold screen
7. Unlock hold button on new hold screen

Before:

Middle Name	Birth Date *
<input type="text"/>	<input type="text" value="1/1/1990"/>
Suffix	Application Language
<input type="text"/>	<input type="text" value="English"/>
Gender (Do not use.)	
<input type="radio"/> Male <input type="radio"/> Female <input checked="" type="radio"/> N/A	

After:

Middle Name	Click to add text	Birth Date *
<input type="text"/>		<input type="text"/>
Suffix		Application Language
<input type="text"/>		<input type="text" value="English"/>

Hide the gender selection.

```
.Gender { display: none; } /* label */  
.gender-container { display: none; } /* radio buttons */
```


Before:

Renew Registration

TEST CARD's registration will expire on 5/8/2019. Would you like to renew the registration?

Expiration Date: 4/16/2022

Expiration Term: 3 Years

Address Check Date (Not used by CPL.): 4/16/2118

Address Check Term (Not used by CPL.): 99 Years

CONTINUE CANCEL

After:

Renew Registration

TEST CARD's registration will expire on 1/24/2022. Would you like to renew the registration?

Expiration Date: 4/16/2022

Expiration Term: 3 Years

CONTINUE CANCEL

Hide the address check date and term.

```
#renew-patron-content div.col-md-12:nth-child(2) { display: none; }
```

Before:

Item Record ⓘ

SAVE **ACTIONS** ▾ **LINKS** ▾

Do androids dream of electric sheep?
By *Dick, Philip K.*

Barcode: **R0428793883** ILL Non-circulating

Call number: **FICTION** Record status: **Final**

Collection: **Adult** Bib control number: **6762**

Shelf location: **None** Parent item:

Owning branch: **Chicago Public Library** Assigned branch: **Back o**

Hold Shelf

- Check In
- Place Hold
- Copy
- Delete
- Undelete
- Add to New Record Set
- Add to Existing Record Set

5/10/2018 1:05:44 PM

After:

Item Record ⓘ

SAVE **ACTIONS** ▾ **LINKS** ▾

Do androids dream of electric sheep?
By *Dick, Philip K.*

Barcode: **R0452530550** ILL Non-circulating

Call number: **FICTION** Record status: **Final**

Collection: **Adult** Bib control number: **6762**

Shelf location: **None** Parent item:

- Check In
- Copy
- Delete
- Undelete
- Add to New Record Set
- Add to Existing Record Set

Hide the hold button on item records.

```
div[id^="item-record-index"] .newHold { display: none; }  
div[id^="item-record-index"] div.item-info div.pull-right div.btn-group ul.dropdown-menu li:nth-child(4) { display: none; }
```

Real-Time Outreach Services



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the possibilities are endless...

Reciprocal Library Verification Tool

Patron Verification exclusively for authorized partner libraries

All fields are required.

Access Code
The unique 6-digit access code assigned to the patron.

Zip Code
The CPL patron's 5-digit zip code.

Barcode
The CPL patron's barcode number.

[Submit](#)


Patron Status This patron is in good standing at CPL



Casper T Ghost
Barcode: D067213371
Expiration Date: Sep 06, 2020

[Verify Another Barcode](#)

Patron Status This patron's card is currently *blocked* at CPL



Kermit Frog
Barcode: D048756661
Expiration Date: Aug 05, 2021

[Verify Another Barcode](#)


Patron Status CPL patron barcode is *invalid*.



Patron Not Found
Barcode number: 151518191512
We successfully searched the Chicago Public Library system, but the barcode was NOT in the CPL patron database.

[Verify Another Barcode](#)

Patron Status CPL card has *expired*



Mickey Mouse
Barcode: D040454215

[Verify Another Barcode](#)



Data Analytics



- Collection maintenance reports (claimed, missing, items in transit)
- Policies and procedures
- Reinforce training

Questions?



Contact Us

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